



# THE VALLEY'S TRUSTED ADVISORS

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WOODBURY UNIVERSITY

## Trusted Advisor Honorees – Attorneys



**John B.  
Marshall**

*Attorney/  
VicePresident/  
Shareholder*

**Lewitt, Hackman,  
Shapiro, Marshall  
& Harlan**

Years in profession: 42

**Response:**

"I actually travel to the client's office rather than make them come to me. I keep a client apprised of everything that is going on in their matter. I always remember that this is their case, not mine. I take the time to explain every-

thing that's going on. There's no such thing as a dumb question, and it's my job to make sure the client understands everything that goes into a decision."

**Client Focus:**

*"He has the ability to work well and communicate with both his client (including a diverse board of directors) as well as third parties with possibly opposing ideas. When matters are outside his areas of expertise, he has no hesitancy to bring in others both inside his firm ... and outside his firm as appropriate."*

*—John Fleck, CEO of  
lycée International de Los*

## Trusted Advisor Honorees – Attorneys

Each attorney was asked to respond to this question: “What are two or three examples of what you are doing to better serve your clients?” Clients also provided insights as to why they wanted their trusted advisor to be recognized.



# Valley's Trusted Advisors - Nominees -

In Alphabetical order



**David Adelman**  
*Partner*  
Greenberg & Bass



**Zane S. Averbach**  
*Managing Partner*  
Goldfarb Sturman & Averbach



**Steven Banks**  
*Partner*  
JH Cohn



**Steve Bellinson**  
*Commercial Credit Officer*  
Bank of the West



**Sue Bendavid**  
*Shareholder*  
Lewitt Hackman



**Mark Berns**  
*Partner*  
JH Cohn



**Robert Berry**  
*Partner*  
JH Cohn



**John Bessolo**  
*Partner*  
Bessolo Haworth & Vogel



**James E. Blatt**  
*President / Owner*  
Law Offices of James E. Blatt



**Steven Block**  
*Senior Vice President*  
Bank of America Merrill Lynch



**Jeff Bobrosky**  
*Partner*  
JH Cohn Insurance Inc.



**Jenny Bolsky**  
*Partner*  
Miller Kaplan Arase & Co



**Kendra Boots**  
*Executive Director*  
Quisenberry Insurance Inc.



**Robert F. Brennan**  
*Partner / Owner*  
Brennan Wiener & Associates



**Michael P. Bridge**  
*Partner*  
Kirsch Kohn & Bridge



**Karen Brown**  
*EVP, Commercial Lending*  
Pacific Western Bank



**Alan Buckle**  
*Senior Vice President*  
Community Bank



**Judith C. Callen**  
*Vice President*  
Wells Fargo Bank

# Valley's Trusted Advisors - Nominees



**Mark Chapman**  
Accountant  
Rose Snyder  
& Jacobs



**Greg DeFrancesco**  
Sr. Vice President  
Momentous  
Insurance  
Brokerage



**Fred Gaines**  
Managing Partner  
Gaines & Stacey



**Jonathan E. Hartman**  
Director, Financial  
Services  
Wheatlan  
Insurance Services



**William Holden**  
Managing  
Director  
Wells Fargo  
Insurance  
Services



**Lee Kleinman**  
Vice President,  
Sr. Comm.Lender  
Wells Fargo  
Business Banking  
Group



**Robert A. Cohen**  
Partner  
Anker Reed  
Hymes Schreiber  
& Cohen



**Frank DiTomaso, Jr.**  
Chairman of Board  
Bank of Santa  
Clarita



**Mark Goldberg**  
Senior Vice  
President  
USI Holdings



**Larry Haworth**  
Partner  
Bessolo Haworth  
Vogel



**Kevin D. Holmes**  
Partner  
JH Cohn



**Dana A. Kravetz**  
Managing Partner  
Michelman &  
Robinson



**Barry Cohn**  
President /CEO  
RGEB Employee  
Benefits



**Steven Driss**  
Broker  
Lifeline Employee  
Benefits



**Donald S. Gottesman**  
Partner  
Kulik Gottesman  
Mouton & Siegel



**Lucia Hazrian**  
Vice President, Sr.  
Relationship Manager  
Community Bank



**Jonathan "Jake" Jacobs**  
Partner  
Rose Snyder  
& Jacobs



**Glen Kulik**  
Partner  
Kulik Gottesman  
Mouton & Siegel



**Gary Coleman**  
Regional Vice  
President  
American  
Business Bank



**James R. Felton**  
Managing Partner  
Greenberg & Bass



**Andrew J. Grey**  
Partner  
Solomon Ross  
Grey & Co



**Mary Healy**  
Sr. Account  
Manager  
Poms &  
Associates



**Carl Kanowsky**  
Owner  
Kanowsky &  
Associates



**David J. Kummer**  
President  
Sullivan Curtis &  
Monroe Insurance  
Services



**Gary E. Condie**  
President  
Condie & Wood  
CPAs APC



**Teri Frankel**  
President  
TCB Insurance &  
Financial Services



**Sheri Grossberg**  
Partner  
Solomon Ross  
Grey & Co



**James D. Hicken**  
President & CEO  
Bank of  
Santa Clarita



**Michael Kaplan**  
Partner  
Miller Kaplan  
Arase & Co



**Stephen J. Landsman**  
Principal  
Squar Milner



**Clint Creado**  
Senior Vice  
President-  
Business Banking  
Manager  
Wells Fargo Bank



**Raymond Furness**  
Partner  
Furness &  
Associates



**Tamara Gurney**  
President & CEO  
Mission Valley  
Bank



**Timothy Hicks**  
Vice President-  
Relationship Manager  
US Bank



**Tobias Kennedy**  
VP Sales & Service  
Montage-  
Insurance  
Solutions



**Scott Lane**  
Senior Vice  
President  
JP Morgan Chase



**Paul Davis**  
Owner  
Paul Davis &  
Alberta Bellisario  
Insurance Services



**Karen L. Gabler**  
Founding Partner  
LightGabler



**Michael Hackman**  
Shareholder  
Lewitt Hackman



**Andrew P. Hillas**  
Managing  
Partner  
Hillas & Nocera



**Dennis V. King**  
Managing Partner  
King King Allerman  
& Jensen



**Steve Lavaeddin**  
Senior Vice  
President  
Boston Private  
Bank & Trust Co

## Valley's Trusted Advisors - Nominees



**Allen M. Lawrence**  
Chairman & CEO  
Allen Lawrence &  
Associates



**Robert A. Levinson**  
Partner  
Levinson  
Arshonsky &  
Kurtz



**Jonathan F. Light**  
Founding  
Partner  
LightGabler



**Edwige Ligonde**  
Acct Executive  
Montage  
Insurance  
Solutions



**Mitzi Like**  
CEO  
L/B/W Insurance &  
Financial  
Services



**Jay Mangel**  
Partner  
Crowe Horwath



**John B. Marshall**  
Vice President,  
Shareholder  
Lewitt Hackman



**Valerie L. Martin**  
VP-Relationship  
Manager  
City National Bank



**Greg Martinez-Miller**  
Vice President  
Wells Fargo Bank



**Christie Mattull**  
Managing Director  
Momentous  
Insurance  
Brokerage



**Christopher C. Melcher**  
Attorney / Partner  
Walzer & Melcher



**Rita Mitchell**  
VP, District Sales  
Manager  
Wells Fargo SBA  
Lending Group



**Michael C. Murphy**  
Owner  
Law Office of  
Michael C. Murphy



**Mitch Nadler**  
Partner  
KPMG



**Caren R. Nielsen**  
Attorney  
Law Offices of  
Caren R. Nielsen



**Todd Northrup**  
Partner  
SingerLewak



**Gary A. Nye**  
Partner  
Roxborough  
Pomerance Nye  
& Adreani



**Mathew Obergtoll**  
Business Banking  
Area Manager  
Wells Fargo Bank



**Maureen O'Gara-Adford**  
Managing  
Partner  
gishSEIDEN



**Gregory J. Owen**  
Senior Partner  
Owen Patterson  
& Owen



**Donald J. Palazzo**  
Managing Attorney  
Nevers Palazzo  
Maddux &  
Packard



**Joyce J. Pearson**  
President  
Pearson Law  
Corporation



**Jillian N. Phan**  
Partner  
Meloni Hribal &  
Tratner



**Matthew Pondella**  
Principal  
Arroyo Insurance  
Services



**Judi Prejan**  
Senior Vice  
President  
Bank of the West



**Kenneth W. Raleigh**  
Regional  
Partner & Tax  
Director  
Hedman Partners



**Stephen Redmond**  
Senior Manager  
Moss Adams



**Kevin Rex**  
Shareholder  
Lewitt Hackman



**Brian Ring**  
Partner  
Ernst & Young



**Pierre J. Rodnunsy**  
Partner  
Santiago  
Rodnunsy &  
Jones



**Tony Rose**  
Senior Partner  
Rose Snyder  
& Jacobs



**Maier Rosenberg**  
Partner  
JH Cohn



**Scott Sachs**  
Regional  
Managing Partner  
JH Cohn



**James Scanlon**  
CEO  
Scanlon &  
Associates



**Jeannene Searce**  
Director, Property  
& Casualty  
Montage Insurance  
Solutions



**Michelle Seukonian**  
Vice President,  
Area Manager  
First Bank



**Leonard Siegel**  
Partner  
Kulik Gottesman  
Mouton & Siegel



**Danone Simpson**  
CEO  
Montage  
Insurance  
Solutions



**Sherry Skarda**  
Senior Vice  
President,  
Employee Benefits  
Poms &  
Associates



**William Sloan**  
Sr. Vice President  
of Real Estate  
California United  
Bank



**Gino Spinelli**  
Vice President, Sr.  
Relationship  
Manager  
Pacific Western  
Bank



**Joshua Spitz**  
Vice President,  
Employee Benefits  
USI Holdings